TIMEWORKS®

User's Manual

SWIFTAX™

For Commodore 64 and 128 Computers

Additions and Correction page are inside back cover (Read both sides)

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Customer Support Plan

Timeworks Telephone Consulting Service is available to all registered users to support your installation and use of our software. To become eligible for this service, you must complete and return the enclosed Software Registration Card.

The answers to almost all of your questions can be found in this manual. To save you time, please read it thoroughly before calling our Help Line. If your question concerns your hardware, contact your computer, disk drive, or printer manufacturer first. If your question concerns the program, we will be happy to receive your calls at one of the following numbers during normal business hours (9 a.m. to 5 p.m. Central Standard Time).

Customer Support Help Line: (312) 948-9208
To send FAX inquiries: (312) 948-7626
Update or replacement information: (312) 948-9206
To place an order: (312) 948-9202

If you write to us instead, be sure to include a phone number where you can be reached during the day.

NOTE: Please read the Pre-Call Checklist, which you will find at the end of this manual, before calling our Customer Support Help Line.

If you enjoy this program, try these other, equally helpful programs from Timeworks, Inc.:

Cat. No.	Program
6105	**Evelyn Wood Dynamic Reader**
6351	**Data Manager 2**
6352	**Word Writer 3**
6354	**SwiftCalc with Sideways**
6355	**Sylvia Porter's Your Personal Financial Planner**
6361	**Partner 64**

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1 PRELIMINARY INFORMATION

A Brief Description of the Program

SWIFTAX is a comprehensive, easy-to-use tax preparation program. Whether you file Form 1040EZ (the simplest of the various tax forms), Form 1040A or Form 1040, SWIFTAX guides you as you go through the process of preparing your tax return. Once your return is completed, SWIFTAX uses your printer to print your return directly onto IRS forms, or onto blank paper.

■ Four Main Menus

This program uses a unique new type of program menu, the pull-down menu. Pull-down menus are simple to use. After you install and load the program into your computer, following the simple instructions which will appear on your screen, you will see the four menu headings across the top of your screen: FILE, HELP, FORMS and SCHEDULES. (Each of these can be easily accessed by pressing your [⇄] arrow keys until the menu you want to pull down is highlighted.) These menus perform the following functions:

The FILE menu:

Use this menu to select your Taxpayer File and to print your tax return and schedules. You can choose to print your return either on blank paper or directly onto IRS tax forms.

The HELP menu:

Use this menu to find useful information to help you prepare your tax return. It also contains changes in the 1987 Federal tax laws, and how they affect each form. Any last minute changes and additions not in the program or manual are contained in the Update option.

The FORMS menu:

Use the options in this menu to select the tax forms which are correct for you and to fill out your tax return.

The SCHEDULES menu:

Use the options in this menu to select the tax schedules which are correct for you and to fill out your tax return.

SWIFTAX will complete and print out the following forms and schedules:

Form 1040EZ	Income Tax Return for Single Filers with No Dependents
Form 1040A	U.S. Individual Tax Return
Form 1040A	Schedule 1
Form 1040	U.S. Individual Tax Return

Schedule A	Itemized Deductions
Schedule B	Interest and Dividend Income
Schedule C	Profit or (Loss) from Business or Profession
Schedule D	Capital Gains and Losses
Schedule F	Farm Income and Expenses
Schedule R	Credit for The Elderly and the Permanently Disabled
Schedule SE	Computation Of Social Security Self-Employment Tax
Form 2106	Employee Business Expenses
Form 2441	Credit For Child and Dependent Care Expenses
Form 8615	Tax Computation for Children Under Age 14 with More than $1,000 of Investment Income

SWIFTAX will help you complete each form with line-by-line help, right on your screen. However, remember that Timeworks cannot offer tax or financial advice.

NOTE: If, after reading this manual carefully or while you're using the program, you have any questions about the operation of the program, phone Timeworks Customer Support Help Line at (312) 948-9208.

Before calling, please review the Pre-call Checklist in Chapter 9.

A word about our typesetting conventions: Keystrokes are set in rounded corner boxes with the cursor moving arrow keys shown [⇄] [↑↓]. In the upper left corner of your keyboard is the Escape key, which we show as [⬅]. Words to be typed in are set to resemble typewritten words.

2 TWELVE SIMPLE STEPS TO FILING YOUR TAX RETURN

With its extensive help screens, SWIFTAX is probably the easiest program you've ever used. However, there are a few steps you need to perform to get up and running with SWIFTAX.

Here is a quick summary of the steps you will go through to get SWIFTAX installed and into action. Once you've read them, you'll realize how comparatively simple it is to complete your tax return with SWIFTAX.

1. First, organize your tax records and other relevant information and have it handy. This information should include:

   - Copies of your tax returns from previous years
   - Your 1987 W2 or 1099 Forms
   - Business records
   - Receipts
   - Canceled checks
   - Other records or documents you think you may need in preparing this year's tax return

2. Run the INSTALL Program. It's on the SWIFTAX Program Disk. (You'll find instructions in Chapter 3.)

3. First, you'll make a working copy of the SWIFTAX program and a disk for your Data.

4. Next, you create a Taxpayer File in the Taxpayer File Selection window. Give it a name, any name, so long as it is no more than five characters long.

5. When you're ready to start preparing your tax return, load the SWIFTAX program into your computer, following the instructions in Chapter 3. Now, you're ready to get down to the business of filling out your return.

6. Then, pull down the HELP menu and select the Update option to read about any last minute changes or additions to the SWIFTAX program which are not in this manual. You can also read about changes in the 1987 tax laws, if any, which may affect your return by selecting "1987 Changes."

7. Review the SWIFTAX function keys by pressing [C=] [F]. These keys will simplify the task of working with the program.

8. Read the Eligibility Requirements for each form or schedule before you choose a tax form, in Chapter 5.

9. Next, select the correct tax form for you from the FORMS menu.

10. Then, select the Taxpayer Information option on the FORMS menu and type in the information requested.

11. Complete the tax forms and schedules following the line by line screen directions.

12. Select the Plain Paper or Forms option and print out your forms and schedules.

And you're finished! That's how easy it is to use SWIFTAX!

3 LET'S GET STARTED

The Contents of Your SWIFTAX Package

Your SWIFTAX software package should contain the following:

- 1 Program disk (Sides 1 and 2)
- This SWIFTAX user's manual
- A Timeworks registration card
- An update and exchange policy card
- A SWIFTAX re-order card
- A brochure describing other Timeworks programs

If you are missing any of the above, call our Timeworks Customer Support Department for a replacement.

Installing SWIFTAX

Before you load SWIFTAX, you must install it in your computer. This means "telling" the program how your computer, program and printer are set up (disk drive system, etc.) and transferring the various files and forms in the program to formatted disks. To simplify this process, your SWIFTAX program disk contains an INSTALL program.

■ Creating Your Work Program and Data Disks

Before you can use this program, you will need the following items:

- SWIFTAX Program disk (Sides 1 and 2)
- Three blank disks

You're now ready to run the INSTALL program which is located on the SWIFTAX Side 2 program disk. Virtually all the instructions you need to run the INSTALL program appear on your monitor.

NOTE FOR COMMODORE 128 USERS: To load the INSTALL program, you must be in the 64 mode. To do this, turn on your computer, disk drive and monitor. Then type **GO 64** and press **RETURN**. When "ARE YOU SURE?" appears on the screen, press **Y** and then press **RETURN**. You will see the Commodore 64 BASIC display, and you can continue using the directions in this section to load the program.

NOTE: If you are using a dual disk drive, load the program with the program disk in drive 0. If you are using two disk drives, place the program disk in drive 8.

1. Turn on your computer, disk drive, printer and monitor.

2. Insert your SWIFTAX program disk into the drive with Side 2 facing up, and type **LOAD "INSTALL",8**. Press **RETURN**.

3. When the word READY appears on the screen, type **RUN**, then press **RETURN**.

4. Next, you must make a working copy of the SWIFTAX original program disk. To make a working copy of the SWIFTAX program disk, take out two (2) blank disks and label them Side 1 and Side 2.

NOTE: Whether you use your own Diskcopy program or SWIFTAX's, be sure to copy Side 1 and Side 2 onto separate disks.

A window will appear, asking if you have made a backup copy. Press **N** for "No," and another window will appear asking you whether you want to use SWIFTAX's own "Diskcopy" program.

NOTE FOR 1571 DRIVE USERS: Please see Chapter 4 of your disk drive user's guide to make a working copy of SWIFTAX. Then, press **Y** when the backup question appears.

NOTE: SWIFTAX's Diskcopy program will not work if you have a printer interface or second disk drive connected to your system. If this is the case, disconnect the extra equipment before running this program.

If you answer "No" to this window, the program will exit to BASIC and you can use your own "Diskcopy" command program.

If you answer "Yes," then SWIFTAX will load the Diskcopy program that will allow you to make a backup copy. Follow the prompts on your monitor for proper disk placement.

5. A set of instructions will soon appear on the screen. At the end of the instructions you will be asked to insert the original disk. This should be the SWIFTAX program disk.

6. Insert the SWIFTAX program disk and press **RETURN**. The screen will go blank and the disk drive may flash on and off. Don't be alarmed by the constant whirr of the disk drive's motor even after the screen asks you to insert the duplicate disk. Also disregard any disk drive error messages that may appear on the screen.

7. Another set of instructions will appear at the bottom of the screen. Insert the blank disk labeled Side 1 and press **RETURN**. Be sure the write protect tab has been removed from the notch along the edge of the disk you want to copy onto.

8. You will be asked to repeat this process two more times. When each step is complete, the screen will become full again. The disk drive will continue to whirr throughout the whole process, even though the drive's light may have gone off.

9. When the whole copying process is complete, the message "Duplication complete" will appear at the bottom of the screen. The disk drive will continue to whirl. Turn the computer off, slowly count to fifteen and turn the computer back on.

10. Repeat the entire process for Side 2.

11. When you have finished copying the program disk, either with your own "Diskcopy" or the process described above, place your original SWIFTAX program disk in a safe place.

See below 11a

12. Insert your work copy of SWIFTAX program disk into the drive with Side 2 facing up, and type **LOAD "INSTALL",8**. Press **RETURN**.

13. When the word READY appears on the screen, type **RUN**, then press **RETURN**.

14. When the backup copy question reappears, answer "Yes." The "Program Configuration" window will appear.

11a You must now make a 2nd copy of Swiftax Side 1. Follow steps 1 thru 9 (pages 11-13). Use Swiftax Program Side 1 as the "original" and a blank disk as the "duplicate". This new copy of Swiftax Side 1 will be modified by the INSTALL program to create your data disk. Be sure to save this disk notched.

b. Label this blank disk as "Data"

Follow steps 5 thru 9 of card "Insert for 1987 Swiftax 64 Version 1.0"

15. Next, you will be asked if you want to create a new Taxpayer File.

    - The first time you run SWIFTAX, press [Y]. If you answer "Yes," then the "Program Configuration" screen will appear.

    - If you answer "No," you will be asked if you want to use SWIFTAX's speed loading feature, "Fast Load". Answer [N] for No if you are using an external speed loading device. A message will appear on your screen that will let you know that the initialization process has been completed and the program will automatically exit to BASIC.

    Press [←] to move to the next step.

16. You will be asked to enter a Taxpayer File name (up to five characters long). Do so, and press [RETURN].

NOTE: You may create as many tax returns as you like with SWIFTAX. However, for each tax return you wish to prepare you must create a separate data disk. Follow these Steps and answer "Yes" to the question "Do you want to create a new Taxpayer File?" for each Taxpayer File you need to create.

- Insert a blank data disk into the disk drive. All previous information on the disk will be erased, so be sure that there is nothing on the disk that you want to keep. Press [C] to begin the initialization process.

- The disk drive will initialize your disk. This process can take a few minutes. Label this newly initialized disk as "Data."

NOTE: Be sure to label your initialized disk(s). This will help you avoid inserting the wrong disk in the disk drive. (If you do insert the wrong disk, you will be prompted by the computer for the correct disk.)

17. You should now have four disks: two Program Work Disks (Side 1 and Side 2), a Data Disk and your original SWIFTAX program disk. Place your original SWIFTAX program disk in a safe place.

You are now ready to run the SWIFTAX program!

NOTE: If you ever want to change your Program Configuration or create a new Taxpayer File, you must run the INSTALL program.

Loading SWIFTAX

NOTE FOR COMMODORE 128 USERS: To load SWIFTAX, you must be in the 64 mode. To do this, turn on your computer, disk drive and monitor. Then type **GO 64** and press **RETURN**. When asked ARE YOU SURE?, press **Y** and then press **RETURN**. You will see the Commodore 64 BASIC display, and you can continue using the directions in this section to load the program.

NOTE: If you are using a dual disk drive, load the program with the program disk in drive 0. If you are using two disk drives, place the program disk in drive 8.

■ On a Single-Drive System

1. Turn on your computer, disk drive, printer and monitor.

2. Insert your SWIFTAX program disk into the drive with Side 1 facing up, and type **LOAD"SWIFTAX",8**. Press **RETURN**.

3. When the word READY appears in the screen, type **RUN**, and then press **RETURN**.

4. Follow the instructions which appear on your monitor.

■ On a Two-Drive System

1. Turn on your computer, disk drive, printer and monitor.

2. Insert your SWIFTAX Working Copy (Side 1) into Drive 0 or 8 and your Data disk in Drive 9 or 1. Type **LOAD"SWIFTAX",8**. Press **RETURN**.

3. When the word READY appears in the screen, type **RUN**, and then press **RETURN**.

4 HOW TO GET AROUND IN THE PROGRAM

Using the Pull-down Menus and Quick Keys

This program features pull-down menus and quick keys, which are simple to use. Every time you load SWIFTAX into your computer, four menu headings will appear:

- FILE
- HELP
- FORMS
- SCHEDULES

To choose a menu heading, press the [⇄] arrow keys to move from one to another menu heading. Once you've selected the main menu you want, press the [↑↓] arrow keys to move to the menu option you want or press the quick key by pressing the letter to the right of the menu option you want to select.

For example, if you are at the FILE menu heading, press [C] to select the "Change Taxpayer" menu option.

Using the Function and Command Keys

Before we talk about specific procedures, let's look at the four function keys that operate the program's most important features:

[←]	ESCAPE
[F1]	HELP
[F3]	SAVE
[F5]	GOTO KEY

■ Using the HELP screens [F1]

Press [F1] to obtain additional information, explanations or instructions for a form or schedule. Press [←] (located at the upper left of your keyboard) to exit the HELP window.

■ The GOTO key [F5]: How to Jump Around the Program

This key allows you to jump from a form into a schedule into a list of supplemental information. For example, if you are completing Form 1040, move to the line titled "Interest Income," press [F5] and you will find yourself in Schedule B. The information on Form 1040, Page 1 will be saved while you are entering information in Schedule B. Press [F5] again on the line titled "Dividend Payers" to enter the names of dividend payers you received. When you save the information on Schedule B or the attachment, the program will return to the top of Form 1040, Page 1 and the information you just entered on Schedule B will appear in the appropriate line on Form 1040.

You can also use this key to enter supplemental information about an item. For example, when you are asked for a number of exemptions (resident or non-resident children), you can press [F5] to enter detailed information about those exemptions, and the total number of dependents will appear in the appropriate line of the form you are using.

If you wish to view or modify this supplemental information, press [F5] first and enter the new information. Press [←] to return to the form. The information will be saved when you save the form.

In addition, here are some frequently used keys and commands that you can use to move around the program and make things happen:

[←]	Escape (Return to the Previous Command)
[RETURN]	Complete an Entry
[SHIFT] [CLR] [HOME]	Move to the Top of the Screen
[CLR] [HOME]	Move to the End of the Screen
[INS]	Insert a Character
[DEL]	Delete a Character

Press [C=] [F] to view all the function keys. Press the [↑↓] arrow keys to move from key to key or press the [SHIFT] [CLR] [HOME] or [CLR] [HOME] to move the cursor to the top or end of the function keys.

[C=] [B]	Clear the Field
[C=] [C]	Load the Calculator
[C=] [D]	Delete a line of information in a list of supplemental information.
[C=] [F]	View the Function Keys
[C=] [M]	Load the Memo Pad
[C=] [T]	Transfer a Calculation

5 CHOOSING THE TAX FORM THAT'S RIGHT FOR YOU

Read the "Eligibility Requirements" for the various tax forms and select the one that best describes you. Be sure you also read through the various Schedules since the Form you choose may require that you also file additional Schedules.

Eligibility Requirements for each Form or Schedule

NOTE: You *must* use one of the following three forms.

■ FORM 1040EZ

You can use the 1040EZ form if:

- You were single on December 31, 1987
- You claim only your own personal exemption
- Your taxable income is less than $50,000

- Your income was only from:
  1. wages, salaries, and tips (reported to your employer)
  2. your interest income was $400 or less
- You don't itemize deductions
- You don't claim any adjustments

■ FORM 1040A

You can use the 1040A form if the following requirements are met:

- Your income was only from:
  1. wages, salaries and tips
  2. interest or dividends
  3. unemployment compensation
- Your taxable income is less than $50,000
- You don't itemize deductions
- You don't claim any adjustments to income other than contributions to an IRA
- You don't claim any credits other than:
  1. the dependent care credit
  2. the earned income credit

■ FORM 1040

You must use Form 1040 if:

- Your taxable income is $50,000 or more.
- You itemize deductions.
- Your spouse files a separate return and itemizes deductions.
- You are a qualifying widow (or widower) with a dependent child.
- You received, as a nominee, interest or dividends that actually belong to another person.
- You received or paid accrued interest on securities transferred between interest payment dates.
- You received any nontaxable dividends or capital gain distributions.
- You are required to fill in Part III of Schedule B for foreign accounts and foreign trusts.
- You had any of the kinds of income shown on Form 1040, lines 11 thru 18, 20b, and 21.
- You take any of the adjustments to income shown on Form 1040, lines 23, 25 thru 28 or any write-in amount included on line 29.
- You claim any of the credits on Form 1040, lines 41, 44, 45, or any write in amount included on lines 42 or 46.

- You owe any of the taxes on Form 1040, lines 38, 48 through 52, or any write-in amount included on line 53.
- You claim any of the payments on Form 1040, lines 55, 59, 60, or any write-in amount included on lines 60 or 61.
- You file any of these forms:

  1. Form 1040-ES, Estimated Tax for Individuals
  2. Form 2210, Underpayment of Estimated Tax by Individuals
  3. Form 2555, Foreign Earned Income
  4. Form 4563, Exclusion of Income from Sources in United States Possessions
  5. Form 8271, Investor Reporting of Tax Shelter Registration Number

■ SCHEDULE A—ITEMIZED DEDUCTIONS

Use Schedule A (with Form 1040) if you itemize your deductions. The itemized deductions on Schedule A are divided into the following categories:

- Medical and dental expenses
- Taxes you paid
- Interest you paid
- Contributions you made
- Casualty and theft losses
- Moving expenses
- Miscellaneous deductions subject to the 2% AGI limit
- Other miscellaneous deductions

■ SCHEDULE B—INTEREST AND DIVIDEND INCOME

If you received more than $400 in either interest or dividends, you must fill out Schedule B of Form 1040. Interest income is listed on line 8 of Form 1040; dividends are then listed on line 10.

■ SCHEDULE C—PROFIT OR (LOSS) FROM BUSINESS OR PROFESSION

If you operated a business or practiced a profession as a sole proprietorship, complete Schedule C. If you had more than one business, or if you and your spouse had separate businesses, you must complete a Schedule C for each business.

■ SCHEDULE D—CAPITAL GAINS AND LOSSES

These are profits or losses that you realize on the sale of any property, such as stocks, bonds, a home, cars, boats, etc. Net long-term capital gains (assets held more than six months) are subject to lower tax rates than on your salary, interest, dividends, etc.

■ SCHEDULE F—FARM INCOME AND EXPENSES

Use Schedule F to report farm income and expenses.

■ SCHEDULE R—CREDIT FOR THE ELDERLY AND THE PERMANENTLY AND TOTALLY DISABLED

You may be able to use Schedule R to reduce your tax if by the end of 1987:

- You were 65 or over, or
- You were under 65, you retired on permanent and total disability, and you received taxable disability income.

■ SCHEDULE SE—SOCIAL SECURITY SELF-EMPLOYMENT TAX

Use Schedule SE to figure any self-employment tax due if:

1. you are self-employed (with net earnings from self-employment of $400 or more) or,
2. if you are an employee of an electing church or church-controlled organization.

See Page 34 through 36—Instructions for Preparing Form 1040.

■ FORM 2106—EMPLOYEE BUSINESS EXPENSES

File Form 2106 if you are an employee and are deducting the following job-related expenses:

- outside salesperson expenses
- travel, transportation, meals, lodging, and other qualified business expenses applicable to this form for an employee other than an outside salesperson.

You need not complete this form if you account to your employer by means of an account book, diary or similar statement, and your business expenses do not exceed your reimbursement. See separate instructions for Form 2106.

■ FORM 2441—CREDIT FOR CHILD AND DEPENDENT CARE EXPENSES

You may be able to take a tax credit for amounts you paid someone to care for your child or other qualifying person so you could work or look for work in 1987. The credit, which is based on a percentage of the amount you paid during the year, will lower your tax. The most the credit may be is $720 for the care of one qualifying person, or $1,440 for the care of two or more qualifying persons.

■ FORM 8615—COMPUTATION OF TAX FOR CHILDREN UNDER 14 WHO HAVE INVESTMENT INCOME OF MORE THAN $1,000

Use this form to comply with the new tax law change that requires children to be taxed at their parents' tax rates when the child has investment income in excess of $1,000.

6 PREPARING YOUR TAX RETURN WITH SWIFTAX

First, let's review the functions and the keys you will be using to prepare your tax return:

[←]	Escape (Return to previous command)
[RETURN]	Complete an Entry
[F1]	Request Help
[F3]	Save a Form, Schedule or Attachment
[F5]	GOTO Key

To Modify a Form, Schedule or Attachment—Select that form, enter the new information and then press [F3] to save your changes.

The GOTO Key—Press [F5] to move from form to schedule, from schedule to supplementary forms, etc. Press [F3] to save your information and return to your previous location. For example, move the cursor to the "Schedule D" line on Form 1040-Page 1, press [F5], and Schedule D will appear on your screen.

The Taxpayer File

Every time you load SWIFTAX into your computer, the menu headings will appear. The Taxpayer File name will be shown in the upper left hand corner.

If you want to change to a different taxpayer, use the [⇄] arrow keys to highlight the FILE menu, then select the "Change Taxpayer" option. Enter the name (up to five characters long) and press [**RETURN**].

NOTE: You cannot have more than one Taxpayer File on each data disk. Use the "Install" program and answer "Yes" to the question "Do you want to create a new Taxpayer File?" for each Taxpayer File you need.

The Taxpayer Information Window

Use your [⇄] arrow keys to highlight the FORMS menu, then select the "Taxpayer Information" option.

A window will appear, listing 5 filing status possibilities. Select the number that fits your filing status, then press the [**RETURN**] key. Press [F1] to obtain help or see Pages 6 and 7 of Instructions for Preparing Form 1040.

The "Taxpayer Information" window will appear.

The "Taxpayer Information" option consists of three sections: "Identification," "Exemptions" and "Financial Information."

NOTE: Complete these sections before you choose a form. They must be filled out in order, and completed before you can select a tax form.

Use the "Identification" section to enter information about yourself and your spouse that appears on your tax form, including name, address, social security number, etc.

Use the "Exemptions" section to enter information about each of your exemptions. If you have dependents, move to the appropriate line and press [F5]. You can then enter the names of your dependents including those 5 years of age or older.

Use the "Financial Information" section to enter your income and your spouse's income from wages, IRAs, and Keogh plans, and the amount of federal taxes withheld on your and your spouse's 1099 forms.

To enter information, press the arrow keys to move the cursor to the line you want to enter. Type your information into that line and press the [RETURN] key after each entry.

When you finish, press [F3] to save your information.

Completing Your Forms and Schedules

Once you complete the "Taxpayer Information," you are ready to access the forms and schedules.

NOTE: Notice how your Taxpayer File name appears in the upper left corner of your screen. This indicates that this file is the Taxpayer File you are currently working with.

■ Moving Through the Forms, Schedules and Supplemental Lists

Press the [↑↓] [⇄] arrow keys to move the cursor around on the screen. Use [SHIFT] [HOME] or [SHIFT] [CLR] [HOME] keys to move to the bottom or top of each form. The flashing cursor shows you which field you're at.

Enter the information for each field, and press the [RETURN] key after each entry. Remember to use the [F5] (GOTO key) whenever appropriate.

When you finish, press [F3] to save your information.

NOTE: You'll need to know the following:

- Form 1040, Page 2—If you itemize your deductions, SWIFTAX will override your standard deduction amount. Under certain conditions, you may find that the amount of your standard deduction is greater than your itemized deductions. If true, then do not use Schedule A.

- Schedule C—you can complete up to two (2) businesses.
- Schedule D—you can enter up to 49 individual security transactions.
- Schedule F—you can complete up to two (2) schedules, one for you, one for your spouse.
- Schedule 2106—you can complete up to two (2) schedules, one for you, one for your spouse.
- Schedule 2106—any excess reimbursement amount reportable as income on line 9 must manually be entered on Form 1040, Line 7.

7 PRINTING YOUR TAX RETURN

The IRS requires that you submit your tax return using their official forms. Computer forms are generally not accepted.

The FILE menu offers you two options:

- Print your tax return on blank paper
- Print your tax return directly onto IRS tax forms

Select the FILE menu and then use the [↑↓] arrow keys to make your selection.

Also available on the FILE menu is the Printer Configuration option. Select this and a window will appear with two options.

- The first option, "Printer Pitch," refers to the number of characters your printer prints in an inch. Most printers print 10 characters to the inch, but some print 12. Consult your printer manual for the proper setting.

- The second option, "Adjust Left Margin," refers to the distance in inches you want your left margin to start. Because printers differ in the initial relation of the print head to the left side of the paper, SWIFTAX allows you to shift all printing to the right or left to adjust the right alignment of your printer. For example, if utilizing pin-feed paper requires that you shift all printing to the right by ¼-inch, enter **0.25** for the left margin.

If you select either the Plain Paper or Forms option, you will see a window with two choices: "Select" or "Manual."

"Select" allows you to choose which of your completed forms you want to print. Each time you are asked if you want to print a form, type **Y** for YES or **N** for NO. Then press [**RETURN**] to move on. "Select" allows you to choose which of the completed form(s) you want to print.

Use the [↑↓] arrow keys to make your selection. Each time you are asked if you want to print a form or schedule, type **Y** for "YES" or **N** for "NO." Then press the [**RETURN**] key to move on.

"Manual" calls up another window with a list of all the forms in the program, and you can choose which form you want to print. Press [**RETURN**] to make your selection and follow the prompts on your screen.

Any supplemental information you have entered, such as exemptions, list of interest and dividend payers, security transactions, etc., will be printed automatically on blank paper at the end of its related form or schedule. Your name and social security number (or spouse's, when applicable) will appear at the top of each supplement.

Printing on the IRS Tax Forms

First, be sure you have extra copies of your tax forms handy. That way you will have a few to practice with. It is also a good idea to print your information on blank paper first. Then you can make changes before printing on the official IRS forms and schedules.

NOTE: Select the "Printer Configuration" option on the FILE menu to modify the printer pitch or left margin adjustment.

1. Make sure that your printer is set to print at the top of the next sheet of paper.

2. Insert a piece of blank computer paper (not the IRS form) into your printer.

3. Note the placement of the top and left edge of your paper in the printer. Make a small mark on the printer where these edges fall with a wax crayon or any other erasable marker.

4. You will be prompted to place the form or schedule in the printer (see Steps 1-3 for alignment instructions).

5. Press any key to continue.

6. You will then be asked if the alignment is correct. Your name and social security number (or spouse's name, if applicable) will be printed at the top of the form. If the alignment is correct, type **Y**, and press **RETURN**. The rest of your form will be printed. If you type **N**, you will be given a second opportunity to realign your paper.

7. Hold your printed form or schedule over a blank IRS form to determine if the entries are properly aligned. If so, make sure the marking you made on your printer in Step 3 is a permanent one. Then, when you roll your tax form into the printer, you can line up the top and left edges of the form with this marking, and all of your forms should print out correctly from this point on.

8. Repeat this procedure to print any additional forms or schedules.

Printing on Blank Paper

1. Make sure that your printer is set to print at the top of the next sheet of paper.

2. Insert blank paper into your printer.

3. Print your tax information.

8 SPECIAL FEATURES

Using the Built-in Memo Pad

Many times, in small business or personal applications, you don't really need a full-featured word processor for the writing task at hand. For jotting memos and reminders and even short letters, SWIFTAX's memo pad is probably just the thing. You can even write notes in the memo pad and transfer them into a formal document later.

To use, press C (M) to call up the Memo Pad and begin entering your information.

You can type in any comments or information that fit in this window, and it will be stored on your data disk. You can recall this information onto your screen by pressing the C (M) key.

Now press the (←) key, at the upper left of your keyboard. The memo pad will disappear from your display, but the information will be stored on your disk.

Using the Built-in Calculator

SWIFTAX has a calculator built-in so you can make your investment calculations without ever leaving the program. You can use the calculator at any point in the program by pressing [C].

It looks just like a real calculator, and you use it in much the same way. As you type numbers on your keyboard, they will appear in the window of the calculator on your screen. This calculator can perform the following types of calculations:

- + Add
- − Subtract
- * Multiply
- / Divide
- ^ Raise to a Power (exponentiation key)
- : Change Sign from + to− or from − to +

To enter an equation into the calculator, enter the first number of the mathematical problem. Then, press the correct key for the sign you want to use (for example, to add, press the [+] key). Then, enter the second number of your equation and press the [=] key. The answer will appear in the window of your calculator. To erase your most recent entry, press [E]. To clear everything that is currently in the calculator, including what is in the calculator's memory, press [C].

If you enter a positive number, you can change it to a negative number by pressing the [:] key. You must do this, however, before you press the operation key (+, −, *, /, or ^). You can reverse any sign by pressing [:].

Like many other calculators, this one also has memory and recall functions. To store the result of a calculation, press [M]. To recall the number later, press [R].

When you finish with the calculator, press [←] to remove the calculator from your display. You will return to the point in your program where you left off.

To transfer the last number that appeared in the calculator to a field on the form or schedule you are currently working with, exit the calculator. Then, press the [↑↓] [⇄] arrow keys to move to that field and press [G] [T]. The number that last appeared in your calculator window will now appear in the field where your cursor is located.

9 APPENDIX

Facts at Your Fingertips

F1	HELP
F3	SAVE
F5	GOTO KEY
←	Return to the Previous Command
RETURN	Complete Entry
SHIFT CLR HOME	Move to the Top of the Screen
SHIFT HOME	Move to the End of the Screen
INS	Insert a Character
DEL	Delete a Character
C= B	Clear the Field
C= C	Load the Calculator
C= D	Delete a line of information in a list of supplemental information.
C= F	View the Function Keys
C= M	Load the Memo Pad
C= T	Transfer a Calculation

Pre-call Checklist

Before You Call . . .

1. Have you thoroughly read your manual and the UPDATE file (Facts at Your Fingertips and the Index) for the answer to your question?

2. Has the problem ever appeared before? What procedure did you use to produce the problem, and can you reproduce the situation? Have you tried reproducing the problem with hardware other than your own?

3. Are you using any additional equipment with your system, such as a mouse or memory-resident software? If so, disconnect the additional hardware/software and try to repeat the problem. If not, did you change your hardware or software configurations before you first experienced the problem?

4. If the problem is related to printing, have you checked your printer manual or contacted your printer manufacturer for the answer? Have you read your interface manual or contacted your interface manufacturer?

5. Have you returned your Registration Card to Timeworks?

If You Call . . .

1. Which Timeworks product are your calling about, and what is the version number? (For example, SWIFTAX, version 1.0) You will find the version number when you view the directory of your program disk.

2. What system are you using? (For example, Commodore 64 or 128)

3. Have your user's manual with you when you call, and keep your manual and any other pertinent materials by the phone in case we need to call you back.

If You Write . . .

Include a phone number where you can be reached during the day.

Glossary of Computer Terms

CURSOR—The computer-generated square that pinpoints your position on the display.

DATA DISK—The disk created to store your information.

DATA FILES—Your Taxpayer Files.

FIELD—A number of characters that represents one specific piece of data. Ex: Description

FORMATTING A DISK—The act of preparing a disk to receive data from a program.

FUNCTION KEY—The special set of keys on your computer identified as [F1], [F2], [F3], etc.

PROGRAM DISK—The disk you purchased containing the Timeworks program.

PROMPT—The line of words located on your screen that requests your response. Ex: YOUR WAGES?

TAXPAYER FILE—The record of information stored on your data disk, such as name, address, income and other specific tax information.

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Notes

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